



Participant Guide – AR350: Maintaining Customers

State of Kansas



AR350: Maintaining Customers Participant Guide

Statewide Management, Accounting and Reporting Tool



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Course Overview

Course Objectives

Upon completion of the course, you will be able to:

- List and define all primary and additional customer roles
- Explain the end-to-end process for Accounts Receivable and Billing and how customers fit into that process
- List the roles and tasks involved in the customer maintenance process
- Enter, copy, and add general information to new customers
- Update customer information

Agenda

Today, we will cover the following topics:

- Understanding Customers
- Creating Customers
- Updating and Maintaining Customers

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Lesson 1: Understanding Customers

Objectives

Upon completion of this lesson, you will be able to:

- List and define primary customer roles including Bill To and Remit From
- List and define additional customer roles including correspondence customer and grants management sponsor
- Describe the changes from the existing State of Kansas customer maintenance process to customer processing in the SMART system
- Explain the end-to-end process for Accounts Receivable and Billing (AR/BI) and describe how customers fit into the end-to-end process
- List roles involved in the customer maintenance process and describe tasks performed by each training role



Key Terms

- **Customers** – Entity that receives or consumes products (goods or services) and has the ability to choose between different products and suppliers
- **Customer Role** – Defines the functional use of the customer by an agency or the State of Kansas

Topic 1: Who are Customers in SMART?

A customer can be designated with one or many different roles within the SMART Accounts Receivable and Billing process. Customer roles determine the functional use of the customer ID. Customer information is associated with specific customer roles. You can use the customer General Information component to maintain information that applies to multiple customer roles and to select those roles. You can use the pages with

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role designations to enter processing attributes and additional information that are unique to the customer's function.

They might be the function that receives bills, or the function that sends in the payment. They might also be part of a larger customer group. Therefore, customers need to be assigned to their appropriate role or roles in order to create reports and analyze their payment history, either by role or as a customer group.

- **Primary Roles**

- **Bill To** – The customer that receives the invoice
- **Remit From** – The customer that pays the invoice

- **Additional Customer Roles**

- **Correspondence Customer** – Correspondence customers are, by default, associated with a bill to customer. The information that you establish for the correspondence customer defines processing options, send to information, and remit to address information for customer correspondence, such as statements, finance charge invoices, and dunning letters.

Note: If you select a customer as a correspondence customer and then decide to deselect the checkbox, you must first delete the correspondence options that you set for the customer.

- **Grants Management Sponsor** – This role indicates that this customer is an external sponsor who provides grant funding to State of Kansas agencies. When you select that the customer is a Grants sponsor, this enables the customer information that you enter on these pages to be included in other Grants pages and processing.

Participant Notes:

Topic 2: End-to-End Process of Accounts Receivable and Billing in SMART

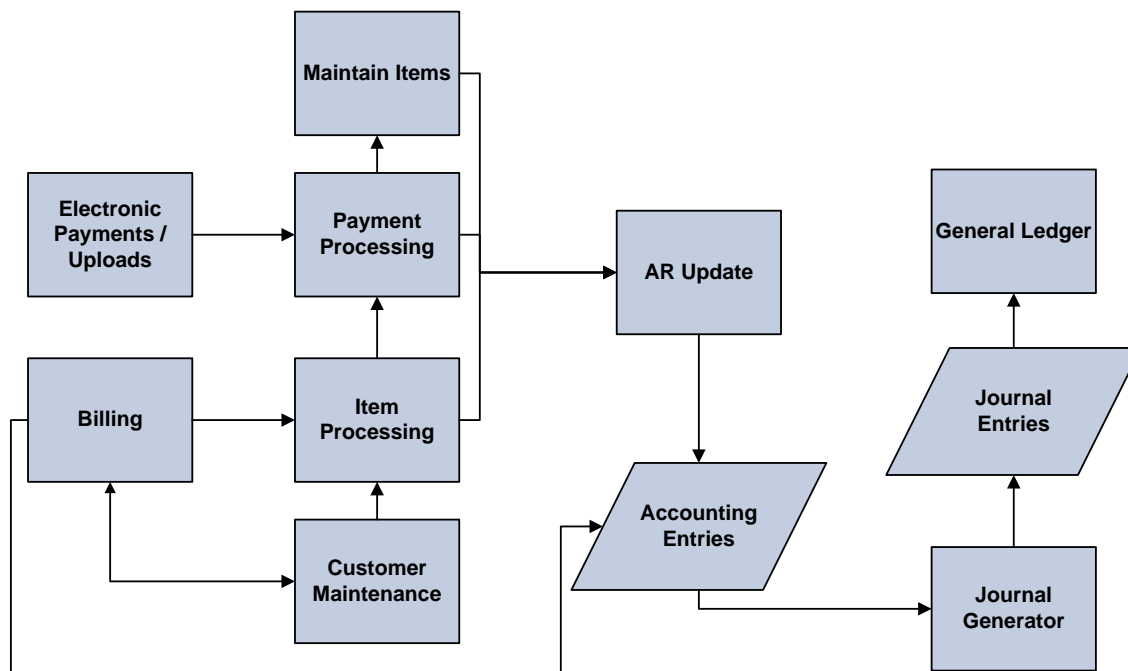


Figure 1. End-to-End Accounts Receivable and Billing Process

Topic 3: Customer Maintenance Roles

| Role | Description |
|-------------------------|--|
| Customer Creator | This role is responsible for creating and updating customers and customer information. |
| AR Agency Administrator | This role is responsible for approving agency deposits in addition to creating and updating customers and customer information. |
| AR Configurator | This role is responsible for setting up and maintaining values that are used for some AR fields including Speed Charts and Reason Codes. |

Participant Notes:

| Role | Description |
|-------------------------|--|
| Billing Administrator | This role is responsible for setting bills to "ready" status and running the process to finalize invoices, as needed. Maintenance of agency-configured values is included with this role. This role also shares access to the customer maintenance tables with the AR Agency Administrator and may create new customers in the SMART system. |
| Central AR Configurator | This role is responsible for setting up and maintaining values that are used for some AR fields, such as payment terms and aging categories. They also have the ability to correct history for effective dated rows. |
| Central BI Configurator | This role is responsible for maintaining centrally controlled BI configuration values such as Remit To Addresses and Billing Sources. |

Table 1. Customer Maintenance Roles

Lesson Review

In this lesson, you learned:

- The definition of customers and customer roles in SMART
- The end-to-end process of Accounts Receivable and Billing
- What the customer maintenance roles are for Accounts Receivable and Billing



Additional Resources

The following are additional resources that provide more detail about the topic we have covered:

- DAAR350: Maintaining Customers Course Materials
<http://www.da.ks.gov/smart/training/coursematerials/DAAR350MaintainingCustomers.html>

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Lesson 2: Creating Customers

Objectives

Upon completion of this lesson, you will be able to:

- Enter a new customer by adding general customer information
- Enter a new customer by copying from an existing customer

Topic 1: Entering a Customer

- In order to conduct business with customers, information needs to be tracked about including general and processing information and roles and correspondence options.

Note: The SOK does not utilize Ship To or Sold To customer roles.

When you establish a customer, the first page that you complete is the **General Info** page. You use this page to enter and maintain overall customer information and roles.

| Page name | Navigation |
|------------------------------------|--|
| General Information – General Info | Customers > Customer Information > General Information |

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General Info | [Bill To Options](#) | [Ship To Options](#) | [Sold To Options](#) | [Miscellaneous General Info](#)

SetID: STATE Customer ID: 0000000021 General Info Links: [...More](#)

*Customer Status: [Active](#) Level: [Regular](#)

*Date Added: [08/10/2009](#) *Since: [08/10/2009](#) *Type: [User 1](#)

*Name 1: [National Society of The Colonial Dames](#) *Short Name: [National S](#)

Name 2: [of America In The State of Kansas](#)

Currency Code: [USD](#) Rate Type: [CRRNT](#)

Roles

| | |
|---|---|
| <input checked="" type="checkbox"/> Bill To Customer Bill To Selection | <input checked="" type="checkbox"/> Correspondence Customer Correspondence Selection |
| <input type="checkbox"/> Ship To Customer Ship To Selection | <input checked="" type="checkbox"/> Remit From Customer Remit From Selection |
| <input type="checkbox"/> Sold To Customer Sold To Selection | <input checked="" type="checkbox"/> Corporate Customer Corporate Selection |
| <input type="checkbox"/> Broker Customer | <input type="checkbox"/> Consolidation Customer |
| <input type="checkbox"/> Indirect Customer | <input type="checkbox"/> Grants Management Sponsor |

Consolidation Business Unit:

Federal Attributes

☐ [Federal Customer](#) Trading Partner Code: Disbursing Office:

Figure 2. General Info Page, part 1

Participant Notes:



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| Fields | Description |
|----------------------|---|
| Customer Status | <p>Select from the available options:</p> <p><i>Active</i> – There are no restrictions on how the customer can be used in the system. This defaults in SMART.</p> <p><i>Inactive</i> – You cannot post pending items to inactive customer accounts in SMART Accounts Receivable. Additionally, prompt lists exclude inactive customers. Their account information, however, appears on the customer pages and remains part of historical information.</p> <p>Note: This field can also be found in other customer areas, such as addresses when users add a new effective dated row. It is best practice to select “Inactive” for incorrect or updated customer information.</p> |
| Date Added and Since | <p>Enter the date when you established this customer in the system. You can also specify that the customer has been a customer since a certain date, which may or may not be the date added. The current date appears by default for both fields.</p> |
| Type | <p>Use this field to enter the customer type. The SOK has four customer types: <i>FEDGOV</i> (<i>Federal Government</i>), <i>LOCGOV</i> (<i>Local Government</i>), <i>STATE</i> (<i>InterFund-State Agency</i>), and <i>OTHER</i> (<i>Other</i>). Customer Type defaults to <i>OTHER</i>, but can be changed.</p> |

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| Fields | Description |
|------------------|---|
| Name 1 | Enter the customer's primary name. Enter the customer's standard name in the Name 1 field on this page. You can enter an alternate name in the Name 2 field on this page if the customer has a different doing business as (DBA) name. A third name field, Name 3 , appears on the Miscellaneous General Information page, in addition to the Name 1 and Name 2 fields. |
| Short Name | Enter a name to appear on pages when there is not room for the full name. The system populates this field with the first ten characters of the Name 1 field. |
| Currency Code | The SOK has one value for this field, <i>USD</i> . This must be selected when creating a customer. This field does not default. |
| Rate Type | The SOK has one value for this field, <i>CRRNT</i> . This must be selected when creating a customer. This field does not default. |
| Bill To Customer | Select if the customer receives invoices. When you select this check box, the system designates the customer as a correspondence and a remit from customer, and makes those check boxes available. Only bill to customers can be correspondence or remit from customers. To change the correspondence or remit from assignments for this customer, clear the corresponding check boxes. Two additional fields appear for entry of the Set ID and the Customer ID of the new correspondence or remit from customer. SMART Billing and Accounts Receivable use these roles. |

Participant Notes:



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| Fields | Description |
|-------------------------|---|
| Correspondence Customer | Correspondence customers are, by default, associated with a bill to customer. The information that you establish for the correspondence customer defines processing options, send to information, and remit to address information for customer correspondence, such as statements, finance charge invoices, and Dunning letters. |
| Remit From Customer | A remit from customer is the paying entity. All customers are their own Remit From Customers by default, unless you assign the customers to Remit From Groups in the General Information component. |

Table 2. General Info Page Elements, part 1

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Support Teams [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

| Team Code | Default | Description |
|-----------|-------------------------------------|------------------|
| LBR | <input checked="" type="checkbox"/> | LBR Grants Admin |

Address Locations [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

*Location: ☒ Bill To ☒ Primary ☐ Broker ☐ Primary
☐ Ship To ☐ Primary ☐ Indirect ☐ Primary
☒ Sold To ☐ Primary ☐ Correspondence Address
☐ RFID Enabled [VAT Default](#) [VAT Service Treatment Setup](#)

Description:

Address Details [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

*Effective Date: *Status: Language Code:
Tax Code: Physical Nature: Where Performed:
Country: **Alternate Names**
Address 1:
Address 2:
Address 3: [View Phone Information](#)
☐ In City Limit
City:
County: Postal:
State:

Figure 3. General Info Page, part 2

| Fields | Description |
|-----------|--|
| Team Code | There is only one value defined for SOK, <i>KANSAS</i> . |
| Default | Use this field to specify the support team to be referenced on sales orders and quotes. This is a required field even though the SOK only has one Team Code . |

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| Fields | Description |
|------------------------|--|
| Location | This field defaults to 1 the first time it is used. If a customer has more than one address, SMART auto-numbers the additional addresses. |
| Descriptions | This field is used to describe the address location. |
| Bill To | Use this field to indicate that this is a Bill To customer address. |
| Primary | Use this field to indicate that this address is the primary mailing address for billing information. If there is more than one customer address, you must indicate which address is the primary address. |
| Correspondence Address | Use this field to indicate that this address is the address where all correspondence is to be sent. |
| Effective Date | This field defaults to the current system date. |
| Address Information | All address information including Address 1 , City , State , and Postal must be entered. |

Table 3. General Info Page Field Elements, part 2

Use the **Bill to Options** page to enter default values for associated processes in Billing. Also, select and identify the collection personnel for this customer.

| Page name | Navigation |
|---------------------------------------|--|
| General Information – Bill To Options | Customers > Customer Information > General Information > Bill to Options |

Participant Notes:

| | | | | |
|------------------------------|---------------------------------|---------------------------------|---------------------------------|--|
| General Info | Bill To Options | Ship To Options | Sgld To Options | Miscellaneous General Info |
|------------------------------|---------------------------------|---------------------------------|---------------------------------|--|

SetID: STATE Customer: 0000000021 National Society of The Colonial Dames

Customer Bill To Options Find | View All First 1 of 1 Last

*Effective Date: 08/10/2009 [31] *Status: Active Currency Code: USD Rate Type: CRRNT [+ -]

Responsibilities:

Credit Analyst: STATE [magnifying glass] Collector: STATE [magnifying glass] AR Specialist: [magnifying glass]

Bill Inquiry Phone: [magnifying glass] Billing Specialist: [magnifying glass] Billing Authority: [magnifying glass]

| | |
|--|---|
| <p>Billing Options</p> <p><input checked="" type="checkbox"/> Direct Invoicing</p> <p><input type="checkbox"/> Prompt for Billing Currency</p> <p>*Freight Bill Type: Shipping [v]</p> <p>Bill Type: [magnifying glass]</p> <p>Billing Cycle Identifier: [magnifying glass]</p> <p>Invoice Form: [magnifying glass]</p> <p>Bill By Identifier: [magnifying glass]</p> <p>AR Distribution Code: [magnifying glass]</p> | <p>Billing Consolidation Data</p> <p>Consolidation Key: [magnifying glass]</p> <p>SetID: [magnifying glass] Customer ID: [magnifying glass]</p> <p>Blanket Purchase Orders</p> <p>Blanket PO Number: [magnifying glass]</p> <p>Start Date: [magnifying glass] [31]</p> <p>End Date: [magnifying glass] [31]</p> <p><input type="checkbox"/> Purchase Order Required</p> |
|--|---|

Figure 4. Bill To Options Page, part 1

Participant Notes:



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| Fields | Description |
|---|---|
| Credit Analyst, Collector, and Billing Specialist | <p>Use these fields to select predefined personnel codes for those who work with this customer. SMART Billing and Accounts Receivable use these Fields.</p> <p>Credit Analyst: This is a required field for all bill to customers. The SOK uses one Credit Analyst, 001.</p> <p>Collector: This is a required field for all bill to customers. There are only two available values for Collector, <i>SETOFF</i> and <i>3RDPARTY</i>.</p> <p>Billing Specialist: This field is agency specific.</p> |
| AR Specialist (accounts Receivable specialist) | <p>Use this field to select the code for the person who SMART Accounts Receivable assigns as the initial owner for the customer's deductions and disputed items. If you do not enter a value, the system uses the Accounts Receivable specialist whom you assign to the Accounts Receivable business unit. If you assign an Accounts Receivable specialist to an entry reason on the Automatic Entry Type - Selection page, the system uses that specialist.</p> |

Table 4. Bill To Options Page Elements, part 1

Participant Notes:

| | |
|---|---|
| <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> InterUnit Billing <input type="checkbox"/> InterUnit Customer GL Business Unit: <input style="width: 100px;" type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Reference Qualifier Code: <input style="width: 100px;" type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Payment Method Options Payment Method: <input style="width: 100px;" type="text"/> Draft Type: <input style="width: 100px;" type="text"/> Direct Debit Group: <input style="width: 100px;" type="text"/> Bank Account: <input style="width: 100px;" type="text"/> Draft Document Required: <input type="checkbox"/> Draft Approval: <input type="checkbox"/> Direct Debit Profile ID: <input style="width: 100px;" type="text"/> Credit Card Profile: <input style="width: 100px;" type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Write-Off Info Maximum Write-Off Amount: <input style="width: 150px;" type="text" value="9999999999999999.990"/> Maximum Write-Off Percent: <input style="width: 50px;" type="text" value="100"/> Days Until Write-Off: <input style="width: 50px;" type="text"/> </div> | <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="checkbox"/> Disable Prices on Receipt </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Immediate Payment Options <input type="checkbox"/> Immediate Payment Required Deposit Percent: <input style="width: 50px;" type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Payment Predictor Options <input type="checkbox"/> Partial Payment Switch <input type="checkbox"/> Payment Predictor Hold Method: <input style="width: 100px;" type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Payment Terms Payment Terms ID: <input style="width: 100px;" type="text"/> Description: Discount Grace Days: <input style="width: 50px;" type="text"/> Due Grace Days: <input style="width: 50px;" type="text"/> </div> <div style="border: 1px solid #ccc; padding: 5px;"> Bank Holiday Options: <input style="width: 100px;" type="text" value="Not Applicable"/> Days: <input style="width: 50px;" type="text"/> <input checked="" type="checkbox"/> Allow due date in next month </div> |
|---|---|

Figure 5. Bill To Options Page, part 2

| Fields | Description |
|---------------------------|--|
| Maximum Write-Off Amount | This is a default value that cannot be changed. The SOK default is 9999999999999999.999. |
| Maximum Write-Off Percent | This is a default value that cannot be changed. The SOK default is 100. |

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| Fields | Description |
|----------------------|---|
| Days Until Write-Off | This is a default value that cannot be changed. The SOK default is 0. This means that if you create or update a customer item, you can write-off the same business day. |

Table 5. Bill To Options Page Elements, part 2

Use the **Correspondence Options** page to select contact and address information that is used in statement and letter headers, and decide where you want your customer to send payments. You can determine when to exclude items from correspondence and when not to send the letter or statement.

| Page name | Navigation |
|------------------------|---|
| Correspondence Options | Customers > Customer Information > General Information > Select 0040 – Correspondence Options in the General Info Links drop-down |

Participant Notes:

Bill To Options | Ship To Options | Sold To Options | **Correspondence Selection** | Correspondence Options

SetID: STATE Customer: 0000000021 National Society of The Colonial Dames

Customer Defaults

Primary Contact:
Primary Address: 1

Correspondence Options Find | View All First 1 of 1 Last

*Effective Date: 08/10/2009 *Status: Active

Language Code: ENG

Contact

☒ Suppress Contact
☐ Primary Contact
☐ Override

Address

☐ Contact Address
☒ Primary Address
☐ Item Address
☐ Override

Remit To Customize | Find | View All First 1 of 1 Last

*Remit to Type Bank Account Bank Type

Default Remit To

Dunning ID

Dunning ID: Dunning Group: All Groups

☐ Dunning Hold

Figure 6. Correspondence Options Page, part 1

| Fields | Description |
|------------------|--|
| Suppress Contact | Use this field to prevent letters from being addressed to the primary contact. |
| Primary Contact | Use this field to have correspondence addressed to the primary contact. |
| Override | Use this field to correspond with someone other than the primary contact. Then select the sequence number of the other contact person from the available values. |

Participant Notes:



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| Fields | Description |
|---------------------------------|--|
| Remit to Type | Use this field to select the default remit to bank account information for the customer on a bill. The SOK value for this field is <i>Default Remit To</i> . Note: If your agency is NOT using Billing, then this field is not used. |
| Bank | The SOK has incorporated <i>REMIT</i> for all state agencies to use for Bank information. Note: If your agency is NOT using Billing, then this field is not used. |
| Account | Use this field to select the default remit to bank account information for customer billing. Note: If your agency is NOT using Billing, then this field is not used. |
| Dunning ID | The SOK has incorporated <i>KSDUN</i> for all state agencies to be used for Dunning ID's within their specific business unit. The Agency AR Configurator is the only role that can create a new Dunning ID. If there is another id in this field, end users do have the ability to choose that option. |
| Statement ID | The SOK has incorporated <i>STATE</i> for all state agencies to be used for Statement ID's within their specific business unit. This field cannot be overwritten. |
| Dunning Hold and Statement Hold | Select any of these check boxes to prevent the system from creating Dunning letters or customer statements for this customer. These check boxes are useful when, for example, a customer does not wish to receive statements, or you wish to exclude a customer from Dunning. |

Table 6. Correspondence Options Page Elements, part 1



Participant Notes:




Statements



Statement ID: 
Statement Group: 

☐ Statement Hold

Overdue Charging

☒ Assess Overdue Charges
Administration ID: 
☐ Hold
Date: 

Overdue Charge Group: 
Finance ID: 
☐ Hold
Date: 

Penalty ID: 
☐ Hold
Date: 

[General Info](#)
[Correspondence Selection](#)


General Info Links: 

Figure 7. Correspondence Options Page, part 2

The remit-from customer is the paying entity. A remit-to customer relationship is set up to mirror customers that have an accounts payable location that pays the bills for multiple companies. If your agency has decided to use this option, it could help you apply payments. For example, if you did not have any invoice numbers available to you in the payment worksheet (which is covered in AR351), you could view all open items for a Remit-from group.

| Page name | Navigation |
|--|---|
| General Information – Remit-From Selection | Customers > Customer Information > General Information Click the Remit-From Selection link on the General Page |

Participant Notes:

Remit From Selection

SetID: STATE Customer: 0000000021 National Society of The Colonial Dames

Other Customer Relationships

Corporate Customer: STATE 0000000021 National Society of The Colonial Dames
Correspondence Customer: STATE 0000000021 National Society of The Colonial Dames

Remit From Customer Group

Customize | Find | View All | First 1 of 1 Last

| SetID | Customer ID | Name |
|-------|-------------|--|
| STATE | 0000000021 | National Society of The Colonial Dames |

[General Info](#)
General Info Links: ...More

Figure 8. Remit From Selection Page

The **Miscellaneous General Information** page stores additional information, such as the date the customer was last modified and by whom.

| Page name | Navigation |
|--|---|
| General Information – Miscellaneous General Info | Customers > Customer Information > General Information > Miscellaneous General Info |

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| | | | | |
|------------------------------|---------------------------------|---------------------------------|---------------------------------|--|
| General Info | Bill To Options | Ship To Options | Sgld To Options | Miscellaneous General Info |
|------------------------------|---------------------------------|---------------------------------|---------------------------------|--|

SetID: STATE Customer: 0000000021 National Society of The Colonial Dames

Miscellaneous General Info

*Name 1:

Name 2:

Name 3:

Tax ID:

Vendor SetID: Vendor ID: [Vendor Information](#)

Workflow User:

Customer Web Site: [Go To Website URL](#)

Stock Symbol: [Go To Stock Symbol](#)

Sub Customer Information

☐ SubCustomer SubCustomer 1: SubCustomer 2:

Date Last Maintained: 08/10/2009 Last Maintained By Operator ID: VP1

[General Info](#) General Info Links:

Figure 9. Miscellaneous General Info Page

Participant Notes:

For additional reference, you can enter contact information for a customer into the Contacts component.

| Page name | Navigation |
|-----------|---------------------------------|
| Contact | Customers > Contact Information |

Contact

SetID: 01600 Contact ID: 10

Contact Information
Find | View All First 1 of 1 Last

*Effective Date: 02/25/2010

*Status: Active

*Name: Cally Colony

*Contact Flag: External

Title: Society Manager

External Contact

Email ID: ccolony@nscolonial.com

Salutation Code:

Salutation: Ms. Colony

*Preferred Communication: Email only

E-mail only

Language Code: English

Person ID:

[Contact Customer Information](#) [Contact Phone and Type](#) [User Profile](#)

[Return to Customers](#)

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

Figure 10. Contact Information Page

Participant Notes:



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| Fields | Description |
|-------------------------|---|
| Contact Flag | Use this field to select whether the contact is External or Internal. |
| Salutation Code | Use this field to select appropriate title from the list. |
| Salutation | Use this field to enter up to 30 characters for a salutation. |
| Preferred Communication | Use this field to select the type of communication the customer contact prefers. If you choose Email only, an e-mail address must be entered on this page. If Fax or Call is selected, click the Contact Phone and Type link to enter the required information. |

To associate this contact with a customer, click the Contact Information Link at the bottom of the Contact Page.

| Page name | Navigation |
|------------------|--|
| Contact Customer | Customers > Contact Information > Contact Information Link |

Contact Customer

SetID: 01600 Contact ID: 10 Cally Colony Effective Date: 02/25/2010

Link Contact to Customer Customize | Find | View All | First 1 of 1 Last

Customer Self Service Security

| *Customer SetID | *Customer ID | Customer Name | Location | Additional Info | Primary Bill To | Primary Ship To | Primary Sold To |
|-----------------|------------------|--|----------|---------------------------------|-------------------------------------|--------------------------|--------------------------|
| 01600 | 0000000000000021 | National Society of The Colonial Dames | 1 | Additional Info | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Participant Notes:



Walkthrough/Activity

We will now complete Activities 1-2: Entering a Customer in your Activity Guide.

Topic 2: Copying a Customer

The customer pages contain a shortcut to establish a customer, called the **Customer Copy** function. You can use it any time you want to use attributes from one customer to establish a new customer.

If you decide to use the copy function, you can copy all or selected attributes from another customer. Clicking the **Copy Customer** link opens up a new page where you can select check boxes for the different customer roles and attributes that you want to assign to your new customer.


Note: The Copy Customer function does not copy all attributes. You must enter the Default, Dunning and Statement ID. It is also best practice to verify that all information was copied correctly.

| Page name | Navigation |
|---------------|---|
| Copy Customer | Customers > Customer Information > General Information Click the Copy From Customer link |





Participant Notes:

Copy Customer

SetID: 17300

Customer ID: 

Data To Copy

| | |
|--|---|
| <input type="checkbox"/> General Information | <input type="checkbox"/> Addresses |
| <input type="checkbox"/> Bill To Options | Effective Date: 12/04/2009  |
| <input type="checkbox"/> Ship To Options | 12/04/2009  |
| <input type="checkbox"/> Sold To Options | 12/04/2009  |
| <input type="checkbox"/> Hierarchy | 12/04/2009  |
| <input type="checkbox"/> Bill To Customers | <input type="checkbox"/> Credit Profile |
| <input type="checkbox"/> Ship To Customers | <input type="checkbox"/> Support Teams |
| <input type="checkbox"/> Broker Customers | <input type="checkbox"/> Product Catalogs |
| <input type="checkbox"/> Indirect Customers | <input type="checkbox"/> Product Aliases |
| <input type="checkbox"/> Region Codes | <input type="checkbox"/> Shipment Block Exceptions |
| <input type="checkbox"/> SIC Codes | <input type="checkbox"/> Shipment Standing Exceptions |

OK Cancel Refresh

Figure 10. General Info Page, Copy from Customer Link

Participant Notes:



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Walkthrough/Activity

We will now complete Activity 3: Copying an Existing Customer in your Activity Guide.

Lesson Review

In this lesson, you learned:

- How to enter a new customer by adding general customer information
- How to enter a new customer by copying from an existing customer

Participant Notes:



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Lesson 3: Updating and Maintaining Customers

Objectives

Upon completion of this lesson, you will be able to:

- Update customer types and general customer information
- Create, apply, and update customer correspondence
- Create, apply, and update customer attachments
- Create, apply, update, and remove customer notes

Topic 1: Updating Customer Types and General Customer Information

When customers have been established, they do not need to be re-entered if changes occur. As your customers change addresses, hire new personnel, and alter relationships within their corporate structure, you must update your information accordingly. However, users need to maintain that information to ensure that the collectors have the most current information when they are making collection calls or that payment information for a customer is accurate and current, as it can affect the processing or receipt of the customer's payment. SMART uses the most recent history for customer processes.

Errors might have been made when a new customer's data was entered into SMART, thus requiring corrections to be made. Users insert effective dated rows for changes to customer information such as office moves and changes in names or phone numbers so that an audit trail is created.

Participant Notes:

The following is the Business Process Flow for Updating a Customer.

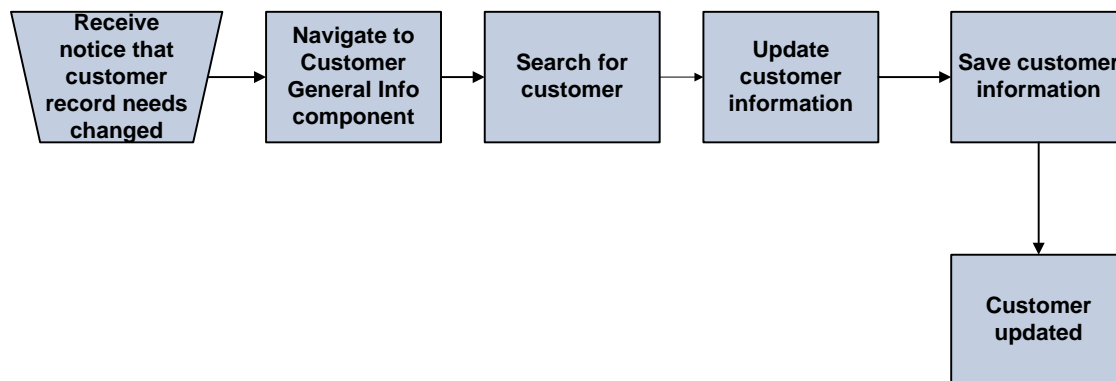


Figure 11. Updating a Customer Business Process Flow



Walkthrough/Activity

We will now complete Activity 4: Updating Customer Types and General Customer Information in your Activity Guide.

Topic 2: Correspondence Customer Options

On the **Customer Correspondence Options** page, you can:

- Select contact and address information that is used in statement and letter headers.
- Decide where you want your customer to send payments
- Override the business unit defaults for dunning letters, invoices, and statements for a particular customer
- Determine when to exclude items from correspondence and when not to send the letter or statement

Participant Notes:



Walkthrough/Activity

We will now complete Activity 5: Correspondence Customer Options in your Activity Guide.

Topic 3: Attachments

Use the **Attachments** page to attach files such as Word documents or Excel spreadsheets to customer records.

| Page name | Navigation |
|-------------|---|
| Attachments | Customer > Customer Information > General Information Click on General Info Links List > Attachments |

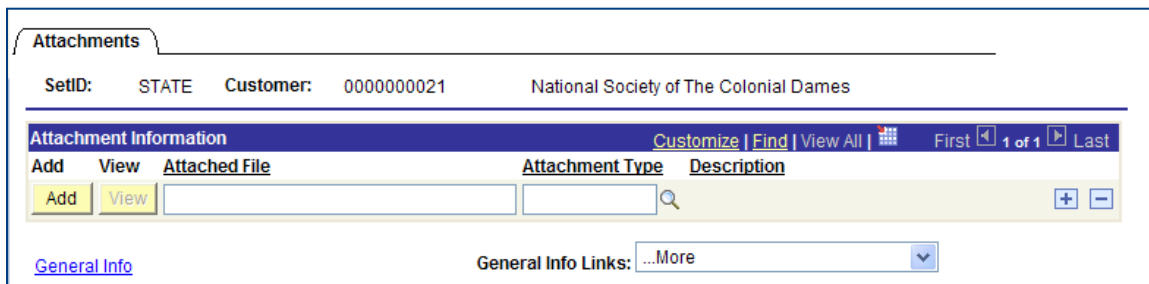


Figure 12. Attachments Page



Walkthrough/Activity

We will now complete Activity 6: Attachments in your Activity Guide.

Topic 4: Notes

Customer Notes are printed on documents such as invoices. You use the **Notes Page** to select standard notes that can be reused for multiple customers or for custom notes

Participant Notes:

with unique messages. For example, you might have a standard note announcing a seasonal promotion or a note thanking a customer for a particularly large order.

| Page name | Navigation |
|-----------|---|
| Notes | Customer > Customer Information > General Information Click on General Info Links List > Notes |

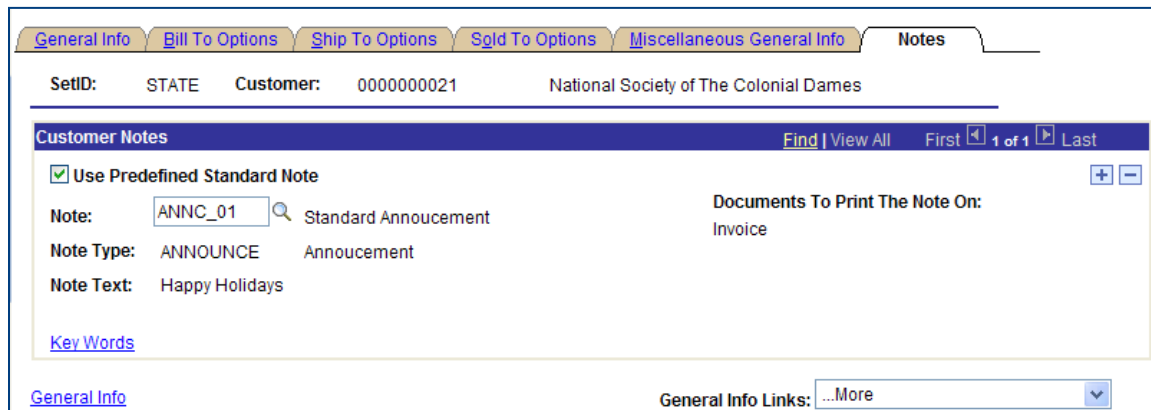


Figure 13. Notes Page


| Fields | Description |
|--|--|
| Delete row  | Use this icon to remove old or invalid customer notes. |

Table 7. Notes Page Field Description



Walkthrough/Activity

We will now complete Activity 7: Notes in your Activity Guide.

Participant Notes:



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Lesson Review

In this lesson, you learned:

- How to update customer types and general customer information
- How to create, apply, and update customer correspondence
- How to create, apply, and update customer attachments
- How to create, apply, update, and remove customer notes

Participant Notes: